



## Income Tax Checklist

Name: \_\_\_\_\_ Tax year: \_\_\_\_\_

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- Change in name, address, dependants, marital status
- Previous year's tax return (New clients only)
- Change in banking information with CRA
- Sold real estate
- Foreign assets > \$100,000

**Slips:**

- T4 - Employment income
- T4E - Employment insurance
- T3 or T5 dividends/interest/trust income
- T2202A - Tuition/education
- CPP or OAS
- T4A - Other income
- T4RSP -RRSP withdrawal
- T4FHSA - First Home Savings Account

**Other income:**

- Self employment
- Rental property
- Child/spousal support received
- Sale of non-registered stocks/bonds/mutual funds/crypto
- First time homebuyers repayment

**Deductions:**

- RRSP contributions
- Child care expenses (camps)
- Moving expenses
- Carrying charges and interest expenses
- Investment management fees
- Interest on student loans
- Foreign income and pensions
- Employment/home office expenses (T2200 required) 2023 onward \$2/day not available.
- Spousal support paid
- Ontario Staycation Tax Credit(accomodation expenses **2022 only**)

**Credits:**

- Property taxes or rent
- Disability Tax Credit (self or dependent)
- Professional or union dues
- Charitable donations or political contributions
- Home buyer's amount
- Medical expenses (must be >3% of your net income or over \$2,635)

Other information: \_\_\_\_\_

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